Toward the Great War: U.S. Army Operations and Mexico, 1865-1917

A Monograph

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AY 2011

REPORT DOCUMENTATION PAGE

Form Approved
OMB No. 074-0188

1. AGENCY USE ONLY (Leave blank)	2. REPORT DATE	3. REPORT TYPE AND DATES COVERED
	19-05-2011	AMSP Monograph, Master's Thesis, JUL10-MAY11

4. TITLE AND SUBTITLE
TOWARD THE GREAT WAR: U.S. ARMY OPERATIONS AND MEXICO, 1865-1917

5. FUNDING NUMBERS

6. AUTHOR(S)
MAJ John J. Hawbaker (U.S. Army)

7. PERFORMING ORGANIZATION NAME(S) AND ADDRESS(ES)

Advanced Military Studies Program
250 Gibbon Avenue
Ft. Leavenworth, KS 66027-2134

8. PERFORMING ORGANIZATION REPORT NUMBER

9. SPONSORING / MONITORING AGENCY NAME(S) AND ADDRESS(ES)

U.S. Army Command and General Staff College
100 Stimson Ave.
Ft. Leavenworth,KS 66027-2301
ATTN: ATZL-SWD-GD

10. SPONSORING / MONITORING AGENCY REPORT NUMBER

11. SUPPLEMENTARY NOTES

12a. DISTRIBUTION / AVAILABILITY STATEMENT
Approved for public release; distribution is unlimited.

12b. DISTRIBUTION CODE

13. ABSTRACT ***(Maximum 200 Words)***

As geographic neighbors, the United States and Mexico have experienced varying tension ever since each country was colonized, gained independence, and solidified its boundaries. Between the American Civil War and World War I, the U.S. Army conducted a wide variety of operations on the Mexican border that contributed heavily to the Army's organization, doctrine, and training as it entered World War I.

This study examines defining characteristics and operations of the United States Army at the end of the American Civil War, when the deactivation of the Union Army combined with multiple mandates and drastic cuts forced adaptation to high demands in ambiguous environments. This study then examines characteristics and operations of the Army during two interventions in the Mexican Revolution, to include the occupation of Veracruz in 1914 and the Punitive Expedition in 1916. This study examines these operations and their effects on the Army as it radically expanded to meet the demands of World War I, which the Army entered only months after the last incursion into Mexico, by linking the U.S. Army of World War I to its previous operations in Mexico.

14. SUBJECT TERMS
Mexico Border, World War I, Army Doctrine

15. NUMBER OF PAGES
57

16. PRICE CODE

17. SECURITY CLASSIFICATION OF REPORT	18. SECURITY CLASSIFICATION OF THIS PAGE	19. SECURITY CLASSIFICATION OF ABSTRACT	20. LIMITATION OF ABSTRACT
Unclassified	Unclassified	Unclassified	UU

SCHOOL OF ADVANCED MILITARY STUDIES

MONOGRAPH APPROVAL

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Toward the Great War: U.S. Army Operations and Mexico, 1865-1917

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Abstract

TOWARD THE GREAT WAR: U.S. ARMY OPERATIONS AND MEXICO, 1865-1917 by Major John J. Hawbaker, U.S. Army, 57 pages.

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Introduction

In the centuries before modern transportation, states and nations generally had more to fear from their geographic neighbors than from more distant threats. As geographic neighbors, the United States and Mexico have experienced varying tension ever since each country was colonized, gained independence, and solidified its boundaries. Similar to other neighboring competitors, much of that tension has manifested itself close to the U.S. – Mexican Border, although events occurring near the border have had resounding effects deep into the geography of both countries. The first settlers of European ancestry to arrive near the modern border were the Spanish in the 16th Century, followed two hundred years later by American frontier settlers.[1] Mexico became independent from Spain in 1821, and clashed militarily with the United States for the first time in the Mexican War of 1846-1848. Since then, there have been several lesser armed conflicts between the militaries of the two countries. In addition to the repercussions from military conflict, the first settlers in the borderlands had to remain constantly wary of raids and attacks from any number of different bands of Indians and bandits. Violence intensified between the end of the American Civil War in 1865 and World War I in 1917, before the frontier gradually submitted to the settlers.

To provide security to the people and territory of the American Southwest after the Civil War, the federal government assigned elements of the United States Army to the border regions. First led by Lieutenant General Philip Sheridan in 1865, the Department of the Missouri established its presence throughout Texas. Immediately after the Civil War ended, the Army had multiple initial tasks, to include pursuing and neutralizing scattered Confederate units before they joined with the French-emplaced Emperor of Mexico, Maximilian.[2] The Army was also

[1] Samuel Truett, *Fugitive Landscapes: The Forgotten History of the U.S.-Mexico Borderlands* (New Haven: Yale University Press, 2006), 18 and 33.

[2] Matt Matthews, *The U.S. Army on the Mexican Border: A Historical Perspective* (Fort Leavenworth, KS: Combat Studies Institute Press, 2007), 43.

responsible for securing the frontier from Indian raids, and for securing Americans in the borderlands from bandits and cattle thieves from both sides of the border.

The political context for the security dilemma faced by the U.S. Army operating on the Mexican border and in Mexico from 1865 to 1917 was extremely turbulent. Napoleon III of France took control of Mexico and installed his puppet emperor, Maximilian, in 1864, when both sides of the American Civil War were near exhaustion.[3] The U.S. government, in accordance with the Monroe Doctrine, never approved of this development, but split over which actions to take to more closely align the Mexican political situation with U.S. interests. This left the military, and Sheridan in particular, caught between civil authorities in Washington and realities on the ground in and near Mexico. Political relations between the U.S. and Mexico varied during the decades to follow, to include heightened tension until 1880, when the two countries temporarily cooperated against the Apaches on both sides of the border. The Mexican political situation became volatile even by Mexican standards with the advent of the Mexican Revolution in 1910. During this extremely bloody period of Mexican history, several countries to include the U.S. sought to influence political outcomes within Mexico. The U.S. Army, with scarce resources and in an unstable political environment, worked to meet the daunting task of securing the vast borderlands from a wide array of threats. The necessary gaps in the security had a variety of effects, to include prompting local governments to establish their own security forces, such as the Texas Rangers, which presented further complications to Army operations.

Due to its geographic proximity, political instability, and occasionally outright hostility, Mexico was the greatest perceived threat to the United States in the years between the Civil War and the First World War. Accordingly, the American Army's doctrine and organization reflected a preoccupation with Mexico before entering war in Europe. The U.S. military conducted operations along the border and planned for many contingencies in Mexico that included all types

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[3] Ibid., 42.

of operations, from civil support to major combat operations. Examination of these operations against the political and physical context leads to this study, which will demonstrate that security operations along the American-Mexican border and major interventions into Mexico between 1865 to 1917 contributed heavily to the doctrine, organization, and training of the U.S. Army leading into World War I.

Methodology

To determine the extent of the effects of Army operations on the American-Mexican border from 1865-1917, this study will first examine defining characteristics and operations of the United States Army at the end of the American Civil War, when the deactivation of the Union Army combined with mandates to simultaneously reconstruct the South, secure the border, and guard the frontier. The Army conducted these massive stability and security operations all while suffering drastic cuts in personnel and resources, which forced adaptation to high demands in an ambiguous environment. Conflicts with Indians, social problems such as racism, and the formation of security organizations like the Texas Rangers also affected the Army's operations and development, and thus bear examination. This study will then examine characteristics and operations of the Army during two interventions in the Mexican Revolution, to include the occupation of Veracruz in 1914 and the Punitive Expedition in 1916. Finally, this study will examine these major operations and relate them to the Army that radically expanded to meet the demands of World War I.

Many distinguished historians and social scientists have written at length on challenges and developments along the U.S. – Mexico border. These secondary sources have informed this study of the characteristics and operations of the U.S. Army. Biographical works describing the perspectives of officers such as Philip Sheridan, Robert Bullard, John Pershing, and George Patton on the U.S. side, as well as Pancho Villa on the Mexican side, are particularly

illuminating.[4] In addition to the biographies of individuals involved in the Army's operations on the Mexican border, there are many works which relate policy and military strategy to operations, notable examples of which are Robert Quirk's *An Affair of Honor: Woodrow Wilson and the Occupation of Veracruz,* Clarence Clendenen's *Blood on the Border,* and John Eisenhower's *Intervention!*[5] These works, along with several that describe the Army along the Mexican border in the late 1800's, do not describe the effects of operations on World War I.[6] Conversely, definitive works such as John B. Wilson's *Maneuver and Firepower: The Evolution of Divisions and Separate Brigades* and Russell F. Weigley's *History of the United States Army* offer relevant information on the organization and disposition of the U.S. Army, but do not include in their scope the links between the Army's operations in Mexico and the Army's characteristics in World War I.[7] Multiple authors have also studied the civilization and complex history of the U.S. – Mexico borderlands, but while offering multiple perspectives, they do not focus on the effects

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[4] Carl Coke Rister, *Border Command: General Phil Sheridan in the West* (Norman: University of Oklahoma Press, 1944); Allan R. Millett, *The General: Robert Bullard and Officership in the United States Army, 1881-1925* (Westport, CT: Greenwood Press, 1975); Martin Blumenson, *The Patton Papers 1885-1940,* (Houghton Mifflin Company: Boston, 1972); Frank Everson Vandiver, *Black Jack: The Life and Times of John J. Pershing* (College Station, TX: Texas A&M University Press, 1977); Donald Smythe, *Pershing, General of the Armies* (Bloomington: Indiana University Press, 1986); Jim Lacey, *Pershing* (New York: Palgrave Macmillan, 2008); Friedrich Katz, *The Life and Times of Pancho Villa* (Stanford, California: Stanford University Press, 1998).

[5] Robert E. Quirk, *An Affair of Honor: Woodrow Wilson and the Occupation of Veracruz* (New York: W. W. Norton, 1962); Clarence C. Clendenen, *Blood on the Border: The Unites States Army and the Mexican Irregulars* (London: Macmillan, 1969); John S. D. Eisenhower, *Intervention! The United States and the Mexican Revolution, 1913-1917* (New York: W. W. Norton & Company, Inc., 1993).

[6] Shelly Ann Bowen Hatfield, *Chasing Shadows: Indians Along the United States-Mexico Border, 1876-1911* (Albuquerque: University of New Mexico Press, 1998); Loyd M. Uglow, Standing *in the Gap: Army Outposts, Picket Stations, and the Pacification of the Texas Frontier, 1866–1886* (Fort Worth, TX: Christian University Press, 2002); Perry D. Jamieson, *Crossing the Deadly Ground: United States Army Tactics, 1865-1899* (Tuscaloosa, Alabama: University of Alabama Press, 1994); Robert M. Utley, *Frontier Regulars: The United States Army and the Indian, 1866-1891* (Bloomington, Indiana: University of Indiana Press, 1977).

[7] James L. Abrahamson, *America Arms for a New Century: The Making of a Great Military Power* (New York: Macmillan Publishing Co., Inc., 1981); John B. Wilson, *Maneuver and Firepower: The Evolution of Divisions and Separate Brigades,* (Washington, DC: U.S. Army Center of Military History, 1998); Russell F. Weigley, *History of the United States Army* (Bloomington, IN: Indiana University Press, 1984).

of the environment on the Army.[8] This study, building on these mentioned secondary sources and available primary documents, examines the links between the Army's operations concerning Mexico and the characteristics of the Army in 1917.

Security and Stability on the Frontier

The continental United States reached its modern physical limits with the conclusion of the War with Mexico in 1848, after which the U.S. gained two-fifths of Mexico, and with the Gadsden Purchase in 1853. The newly acquired territory brought with it persistent security challenges. When not committed to major conventional conflicts, the U.S. Army provided a large portion of the security in the areas along the U.S. – Mexico border. The Army experienced great change after the American Civil War as it transitioned from a massive conventional force to a small, lightly equipped, poorly paid collection of Civil War veterans, European immigrants, and recently freed slaves. Even without a formal method of capturing and applying institutional lessons learned, the Army nevertheless changed the way it fought because of the Civil War, and it continued to change and adapt in response to missions required of it in the decades of security operations following the Civil War. As the American Southwest received an influx of Americans from the east and Mexicans from the south, the region underwent social and civil developments that also affected the U.S. Army. Operations in this ambiguous and tumultuous environment significantly shaped the Army as it moved toward the challenges of the 20th Century.

The Post Civil War Army

The cataclysm of the American Civil War produced an Army that was both weary and, after warfare on a nearly unprecedented scale, skilled in conducting conventional warfare. The

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[8] Gerald Horne, *Black and Brown: African Americans and the Mexican Revolution, 1910-1920*, (New York: New York University Press, 2005); Truett, *Fugitive Landscapes*; Walter Prescott Webb, *The Texas Rangers: A Century of Frontier Defense* (Austin, TX: University of Texas Press, 1965); Robert F. Utley, *Lone Star Justice: The First Century of the Texas Rangers*, (Oxford: Oxford University Press, 2002); Charles H. Harris and Louis R. Sadler, *The Texas Rangers and the Mexican Revolution: The Bloodiest Decade, 1910-1920* (Albuquerque: University of New Mexico Press, 2004).

Army experienced great challenges immediately following the war. First, the massive armies required to maintain the Union were rapidly demobilized. In May 1865, the Army consisted of 1.2 million volunteers and approximately 30,000 Regular Army soldiers.[9] By the end of 1866, the Volunteers were deactivated, and the Army was reorganized to a strength of approximately 54,000.[10] The regular army found itself responsible for the administration of reconstruction in the South, while simultaneously securing the borderlands with Mexico and the frontier in the west against Indian raids and cross-border incursions. To meet these steep demands, the Army revised its doctrine and training to reflect a more uniquely American military theory. The Army also established a network of small garrisons and outposts throughout the frontier in an attempt to secure the border and contested settlements.[11]

In July of 1866, Congress reorganized the Regular Army to consist, after the demobilization of the Civil War volunteers, of forty-five infantry regiments, ten cavalry regiments, and five artillery regiments. These were divided across four divisions, one of which was the Division of the Missouri, which included the frontier and most of the contested portion of the Mexican border.[12] The Army's total strength in 1866 was 54,302, but over a third of this force was employed in reconstruction tasks.[13] Numbers continued to decline during the remainder of the century, in spite of the constant requirements. Congress regulated in 1869 that the Army would consist only of twenty-five infantry, ten cavalry, and five artillery regiments, with an approximate total strength of thirty thousand soldiers. The shortage of manpower was only one of the post-Civil War Army's problems, however. Soldiers recruited after the Civil War were often

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[9] Wilson, *Maneuver and Firepower*, 16.

[10] Utley, *Frontier Regulars*, 15.

[11] Uglow, *Standing in the Gap*; Matthews, *The U.S. Army on the Mexican Border*, 46.

[12] Ibid., 13.

[13] Ibid., 12.

not trained to conduct even individual tactical tasks during any time in their term of service.[14] The soldiers in frontier and border forts in the decades following the Civil War were more laborers than soldiers, because the tasks of simply living in the frontier in widely dispersed forts and outposts required all of the man-hours of labor available from the soldiers, without leaving time to train or conduct operations.[15] The only improvement to the Army's predicament after the Civil War was the acquisition of improved firearms, but, as indicated by a Major General O. C. Ord, the rifle was not a panacea. He opined that although the Army had a new rifle, it also had "a much less intelligent soldier to handle it."[16]

Doctrine constituted another problem, although in this area military officers quickly acted to establish a framework in which Army units could operate. Prior to the Civil War, the U.S. military took strong cues from the European powers in the formation and employment of military force. After the Civil War, American military thinkers reflected on the massive casualties inherent to European tactics with modern weapons combined with operations in the vast American terrain, and thus began to break from European schools of thought. As one Civil War veteran stated, "We are a practical people…Let us leave show and useless, brain-confusing evolutions to monarchial Europe."[17] The first authorized doctrinal publication was a work on infantry and cavalry tactics by Emory Upton in 1867, which reflected original American military thought in combination with European theory.[18] The manual, *A New System of Infantry Tactics,* advocated the greater use of terrain as cover by extended formations using aimed fire.[19] Upton

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[14] Andrew J. Birtle, *U.S. Army Counterinsurgency and Contingency Operations Doctrine, 1860-1941* (Washington, D.C.: U.S. Army Center for Military History, 2004), 59.

[15] Utley, *Frontier Regulars,* 81-87.

[16] O. C. Ord quoted in Utley, *Frontier Regulars,* 22.

[17] "Change in Tactics" *The United States Army and Navy Journal* III, no. 5 (September 1865): 76.

[18] Jamieson, *Crossing the Deadly Ground,* 3.

[19] Birtle, *U.S. Army Counterinsurgency and Contingency Operations Doctrine,* 66.

directed his manual at the battalion and lower levels, and as shown even in later editions of the manual, did not include any changes in brigade or division structure or employment.[20] Military leaders at higher levels also failed to develop doctrine tailored to Indian Wars or border security.[21] Army regulations in 1873 continued to describe corps headquarters and list the division as the basic component of the Army, which conflicted with the reality of operational units at the time. On the ground in the borderlands and frontier, the Army after 1869 had only thirty-five maneuver regiments, which were spread across such great distances that few regiments were able to conduct regiment-size operations without gathering the geographically closest elements of several regiments for specific missions.[22] The military eventually adapted to the frontier not through formal education and systems of lessons learned, but primarily through older soldiers and officers passing their experience to younger leaders.[23] Educators and leaders in the Army concurrently explored military theory, as indicated by West Point curriculum, officer training at Fort Leavenworth in the School of Application for Infantry and Cavalry, and writings by military authors such as John Bigelow, who wrote in the 1890's on military topics to include strategy, operational design and planning, and tactics.[24] In the decades before World War I, leaders in the American Army drove massive changes in doctrine and theory to reflect a modern purpose for the Army with modern equipment, which helped to prepare it for fighting in Europe.

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[20] Emory Upton, *Infantry Tactics Double and Single Rank, Adapted to American Topography and Improved Fire-Arms* (New York: D. Appleton and Company, 1875), viii.

[21] Utley, *Frontier Regulars*, 46.

[22] Wilson, *Maneuver and Firepower*, 16.

[23] Birtle, *U.S. Army Counterinsurgency and Contingency Operations Doctrine*, 63.

[24] Timothy K. Nenninger, *The Leavenworth Schools and the Old Army: Education, Professionalism, and the Officer Corps of the United States Army, 1881-1918* (Westport, Connecticut: Greenwood Press, Inc., 1978), 156; John Bigelow, *The Principles of Strategy: Illustrated Mainly from American Campaigns*, 2nd ed. (Philadelphia: J.B. Lippincott Company, 1894), 259-265; James Mercur, *Elements of the Art of War: Prepared for the Use of the Cadets of the United States Military Academy*, 3rd ed. (New York: John Wiley & Sons, 1894), 16.

In attempts to maintain security for new settlers on the border and in the frontier against cross-border raids, the U.S. Army established garrisons and outposts. The dispersed nature of bandits and Indian raiders necessitated dispersed forts and outposts, although due to the conditions and manpower deficiencies described above, the outposts were not overly effective. Texas was home to the first frontier and border forts. Shortly after the Civil War, the Army manned seventy outposts and forts in Texas, most of which were along the border with Mexico as shown in Map 1 below. The major forts in Texas usually had garrisons ranging from two to five companies, which could range from one to three hundred men. Sub-posts were manned with a company each, and detachments of two to fifteen men from the sub-posts would man picket stations.[25] The Army quickly adapted its tactics to conducting patrols from these forts and sub-posts, which provided some security. Even these patrols did not become entirely effective, however, except during the limited times of cooperation with the Mexican military.[26] Along the entire Texas-Mexico border, outposts did not stop raids against settlements, stage stations, and mail lines, but undoubtedly reduced them.[27]

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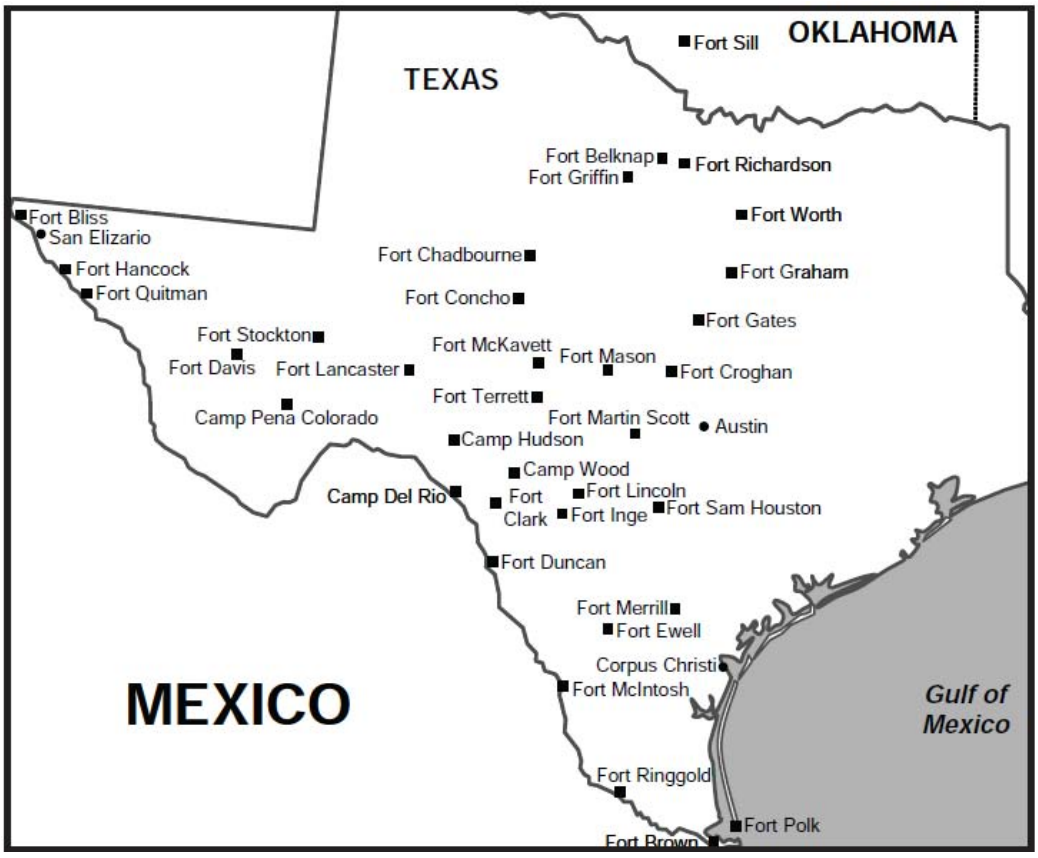
[25] Uglow, *Standing in the Gap*, 18; Matthews, *The U.S. Army on the Mexican Border*, 46.

[26] Uglow, *Standing in the Gap*, 3; Matthews, *The U.S. Army on the Mexican Border*, 48.

[27] Uglow, *Standing in the Gap*, ix-x.



Map 1: Primary Texas Forts, 1870 [28]

Regardless of the shortfalls of doctrine, organization, training, equipment, personnel, and facilities, the Army remained responsible for a variety of monumental tasks. The Army was to reconstruct a shattered South, and was the only federal agency conducting stability and counterinsurgency operations among the Indians on several thousand square miles of frontier. Simultaneously, the Army guarded the Mexican border in Texas, New Mexico, and Arizona against cross-border raiders, cattle thieves and, in a deterrent role, the Mexican Army. The combination of these tasks gave breadth to the Army's repertoire, but not depth in any one area. The longest enduring task, which was securing the Mexican border, had the most significant effect on Army organization and development as it progressed from post-Civil War challenges to conflicts of the twentieth century.

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[28] Matthews, *The U.S. Army on the Mexican Border,* 47.

Security Operations on the Mexican Border

The American Civil War affected both sides of the border, but the U.S. Army did not give full attention to Mexico until immediately after the fall of the Confederacy. The years following the deactivation of the Civil War Union Army created a lean and over-tasked Army in austere conditions, and all operations during this period served to develop the U.S. Army's ability to operate in ambiguous situations with severe resource constraints. Army operations on the border from 1865 to 1917 began with deployment to the border in response to the French conquest of Mexico, which was followed by decades of constabulary operations which culminated with the National Guard mobilization in 1916. The Army conducted multiple cross border operations, most of which were unauthorized and some of which were contested. The decades of providing security built on previously gained experience to shape the Army before 1917.

The U.S. Army deployed along the Mexican border immediately after the end of the Civil War. General Ulysses S. Grant sent General Philip Sheridan with 52,000 soldiers to the Rio Grande so quickly after the Confederacy's capitulation that there was not even time for him to march with his Civil War command in the victory parade in Washington.[29] Sheridan deployed to the border to direct psychological, if not physical, threat against the French-emplaced Emperor Maximilian, who had supported the Confederacy during the war. Both Sheridan and Grant viewed the war in Mexico between Maximilian and the Mexican Republicans as an extension of the war that they had just won, and both desired to directly bring down Maximilian.[30] The civilian authority over the military disagreed, however. Secretary of State William H. Seward and President Andrew Johnson, wishing to avoid any confrontation with European powers, prohibited

[29] Rister, *Border Command*, 10.

[30] Clarence C. Clendenen, *Blood on the Border: The United States Army and the Mexican Irregulars* (London: Macmillan, 1969), 57.

incursions into Mexico.[31] This left Sheridan to conduct a "cold war" against Maximilian through support to Mexican Republican troops and an occasional minor incursion, contributing to Napoleon III relinquishing control of Mexico back to the Republican government of President Benito Juarez in 1866.[32] As the volunteers deactivated, the remnants of the Army were postured in frontier areas where they would be responsible for security for the next several decades of unstable peace.

The return of President Benito Juarez to power in Mexico brought peace between conventional forces in the borderlands until his death in 1872, but marked an increase in Indian and bandit threats. The U.S. Army continued to assume responsibility of security for the ranches and settlers in the border areas. In 1873, General Sheridan was in command of the entire border with Mexico, from Canada to the Gulf. He had approximately 800 soldiers stationed along the border in Arizona and New Mexico, with another 2,500 men, mostly immobile infantry, in forts along the Rio Grande. These numbers were insufficient to stop cross-border raids by Indians and bandits against both sides, however.[33] The Mexican Army was even less able to stop cross-border raids.

Complicating the security operations was the political moratorium on cross-border military operations. The U.S. had little intention of allowing Mexican military north of the border, and neither President Juarez nor his successor, President Sebastian Lerdo de Tejada, would allow American forces to enter Mexico.[34] In spite of this, the Army crossed the border multiple times

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[31] Matthews, *The U.S. Army on the Mexican Border*, 17-18.

[32] Clendenen, *Blood on the Border*, 59. The most notable incident before Maximilian's demise was the occupation of the Imperialist-held city of Matamoras in November, 1866. Even this, however, did not greatly affect the outcome of the Mexican struggle, as it merely freed Maximilian's troops from guarding Matamoras and allowed them to defeat the Republican forces. The American troops withdrew quickly, and the officer in charge of Brownsville was relieved of command over the incident amid U.S. government apologies to the Republicans.

[33] Matthews, *The U.S. Army on the Mexican Border*, 46.

[34] Utley, *Frontier Regulars*, 346.

throughout the 1870's.[35] The most notable crossing in the 1870's was Colonel Ranald MacKenzie's expedition against the Kickapoo Indians. The Kickapoos were legitimized by the Mexican government, at least at the local level, and had conducted widespread and effective raids against Texas ranchers from 1865 to 1872.[36] By January of 1873, President Grant directed Sheridan to employ the 4th Cavalry Regiment under MacKenzie to counter the Kickapoo raiders. Sheridan translated the guidance from the President into orders to MacKenzie to counter-raid a Kickapoo village that was over seventy miles from his base, and across the border. MacKenzie took six cavalry troops, totaling approximately 400 men, across the Mexican border against the Kickapoo village. The village contained only women, children, and men older than fighting age, nineteen of whom MacKenzie's men killed before burning the village and two other nearby villages. MacKenzie took forty captives, and his one killed and two wounded soldiers, back to the American side of the border before any Mexican forces could react.[37] MacKenzie's raid contributed to the long-term success of stopping the Kickapoo raids into Texas.

The cross-border raids during the administration of President Lerdo all but ceased for the few years after MacKenzie's expedition against the Kickapoo village in 1873. The peace was short-lived, however. In 1876, raids from the Mescalero Apaches and Lipans increased, and Texans demanded security. Army elements under Brigadier General O.C. Ord, commander of the Department of Texas, and Lt. Col. William "Pecos Bill" Shafter, commander of the 24th Infantry Regiment, conducted several cross-border operations against Indian raiders. Whether or not these operations were in actual hot pursuit, they claimed legality as such.[38] President Lerdo was not in a position to effectively counter the incursions or even to protest after November of 1876, when

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[35] Hatfield, *Chasing Shadows*, 136.

[36] Utley, *Frontier Regulars*, 346.

[37] Ibid., 347.

[38] Ibid., 350.

Porfirio Díaz replaced him as Mexico's president.[39] Shortly thereafter, while anti-American sentiment in Mexico was on the rise in April 1877, elements of Shafter's regiment surrounded the Mexican town of Piedras Negras in an unsuccessful attempt to secure the release of two Mexican citizens who had assisted American troops in previous operations. In the following year, American troops under Ord, Shafter, and MacKenzie crossed the border several times under similar circumstances with no effective counter from the Mexican government. These operations undoubtedly embarrassed President Díaz, possibly prompting him to act to secure his side of the border.[40] Tensions rose between the two countries throughout the next two years until President Díaz and President Rutherford B. Hayes agreed to allow more cooperation between the armies, which also committed Mexico to securing more of the southern side of the border.[41] At strategic or national policy level, the cross-border operations exacerbated tensions and caused delays in cooperation against the shared Indian threat. At the tactical and operational levels, however, Ord's units under Shafter and MacKenzie effectively countered nebulous enemies in a hostile environment, further increasing the Army's adaptability and flexibility.

Further developments in the U.S. Army, in conjunction with increased cooperation between the Mexican and American armies, brought nearer the end of the cross-border Indian raider. Developments in the Army included using Indian scouts to find the enemy, following him with drastically lightened flying columns of cavalry and mule-mounted infantry, and employing aggressive small-unit tactics to gain contact and finish each engagement decisively toward a collective purpose.[42] Political restrictions were lifted significantly beginning in 1881, with the

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[39] Colin M. MacLachlan and William H. Beezley, *Mexico's Crucial Century, 1810-1910: An Introduction* (Lincoln: University of Nebraska Press, 2010), 117; T. R. Fehrenbach, *Fire and Blood: A History of Mexico* (New York: Da Capo Press, 1995), 452.

[40] Matthews, *The U.S. Army on the Mexican Border*, 53.

[41] Utley, *Frontier Regulars*, 355-356.

[42] Birtle, *U.S. Army Counterinsurgency and Contingency Operations Doctrine*, 76.

increase of reciprocal crossing agreements to allow for pursuit and attacks against Apaches in Arizona and New Mexico.[43] The campaign against Victorio, the elusive Mimbres Apache chief, comprised an example of all of these factors combining to bring about success. In 1880, after years of pursuit by separate Mexican and American operations on each side of the border, the Mexican and American governments began to cooperate to defeat Victorio. The U.S. assembled a task force of Army elements, twelve Texas Rangers, and almost 100 civilian volunteers with permission to cross into Mexico. After a short pursuit, the American troops were asked to leave on the Mexican Army's request, but not without setting the conditions for Victorio's defeat.[44]

The Victorio Campaign is one of the earliest examples of a multinational operation against an unconventional threat, which is among the most complex military operations. The U.S. Army adapted to this operation with the same affinity as it adapted to previous operations. The Army had resumed operations along the Mexican border immediately after the Civil War with a large army, which quickly diminished in size and resources. Throughout the entire period from 1864-1917, the Army conducted operations along the entire range of possible conflicts in a hostile environment against an ambiguous enemy. During this time, Army leadership debated internally and with lawmakers on the form and cost of regular and reserve troops. By the 1890's the Army and lawmakers, swayed by the "reform movement," acted to improve and resource the Army. Many of these reforms were in response to perceived shortcomings in operations on the Mexican border, which was the primary military and diplomatic concern for the United States in the decades after the Civil War.[45] The complexity and austere conditions of these decades of service on the country's southern border began to prepare the Army as an institution, through

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[43] Hatfield, *Chasing Shadows*, 46.

[44] Kendall D. Gott, *In Search of an Elusive Enemy: The Victorio Campaign, 1879-1880* (Fort Leavenworth, KS: Combat Studies Institute Press, 2004), 40.

[45] Abrahamson, *America Arms for a New Century*, 31-33, 40; Herbert A. Johnson, *Wingless Eagle: U.S. Army Aviation through World War I* (Chapel Hill, NC: University of North Carolina Press, 2001), 157.

formal doctrine and informal institutional knowledge, for the hardships and conditions awaiting them in Europe during the First World War.

Social Problems, Solutions, and Effects on the Army

The region that became the U.S.-Mexico borderlands developed through an influx of Mexicans from the south, Indians from the north and the west, and American ranchers and businessmen from the east. Combined with the emancipation of the slaves in the South and the Texas loss in the Civil War, issues along the border consisted of more than just raiders and cattle thieves. The immense task of securing the American settlers amid these social issues fell to the U.S. Army, which quickly proved to be under-resourced and under-staffed for the requirements. The settlers soon found it necessary to provide for at least a portion of their own security. The most well known solution to the local security problem on the southwest border of the U.S. is the Texas Rangers, formed by Texas in response to Indian and Mexican raiders and thieves, as well as American outlaws. The activities of the Texas Rangers amid racial tension in the South did not comprise the sole preparation of the U.S. Army for combat in World War I, but those factors contributed nonetheless to the Army's institutional development.

The Texas Rangers were formed in 1835 while Texas was an independent republic. The Texas Army, numbering less than 600 men, was preparing to invade Mexico, thus leaving civilians vulnerable to Indian attacks. The Rangers were formed to protect the frontier against these Indian attacks. They were a military organization and came to resemble a cavalry regiment within a few years of their formation.[46] After the American Civil War, the Rangers were disbanded until 1874, when they were legislatively reformed as the Frontier Battalion. Their

[46] Webb, *The Texas Rangers*, 30-36.

purpose remained to defend against raiders and to prevent cattle rustling, which was one of the original and most compelling reasons for the formation of the Rangers.[47]

The Frontier Battalion eventually gave way to the Ranger Force in 1900, but not before conducting decades of law enforcement operations, mostly on the U.S. side of the border. The Army interacted several times with the Rangers of the Frontier Battalion, and the interactions were generally not positive. One operation which began as joint is representative of the relationships between the Rangers and the Army. In 1875, Captain Leander McNelly of the Frontier Battalion led approximately thirty men against approximately 300 Mexicans who had stolen cattle from Texas. McNelly's men went to the wrong village, killed or captured several innocent people there, then expected the U.S. Army to cross the border in their rescue after several hundred angry Mexicans engaged them. McNelly's stated purpose before the operation was to be cut off to entice an Army incursion into Mexico, but his plan backfired and he was forced to evade back to the north side of the border without Army support. [48] This incident is representative because it underscores the miscommunications and difficulties between the Army and other governmental organizations. The Rangers did not regard higher political purpose as something to be concerned with, which was the reason for their incursion into Mexico and their continued requests for the Army to punish bandits where they hid in Mexico. From the Army's perspective, lack of cooperation with any form of law enforcement across the border and a lack of common operating procedures allowed the bandits to operate with impunity. Although it was

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[47] House Executive Document 39, *Report of the United States Commissioners to Texas* (Washington, D.C.: Government Printing Office, 1872), 18-21; Leon Claire Metz, *Border: The U.S.-Mexico Line* (El Paso, Texas: Mangan Books, 1989), 150. Cattle theft was bad enough from 1866 to 1872 that of the 158,688 cowhides imported into Corpus Christi from Mexico, 25% had Texan brands and another 25% were unreadable. An even greater number than that must have been leaving Texas to Mexico, according to the federal commission investigating the rustling situation in 1872. Mexicans could not receive financing for cattle from any Mexican institution, so they stole it from Texas, then sold the hides back to fill demand on the East Coast.

[48] Webb, *The Texas Rangers*, 262-267; Metz, *Border*, 152.

perhaps not immediately apparent, Army leaders involved with incidents with the Rangers, negative or otherwise, learned valuable lessons about working with disparate organizations.

Interactions between the Army and the Rangers were not all negative. The *Posse Comitatus* Act restricted Army operations on U.S. soil beginning in 1878, which necessitated working together in many early cases.[49] The Rangers were severely undermanned during most of their existence, also. These factors, combined with the initiative of junior leaders, led to occasional good partnerships forming in spite of the only limited combined operations. In early 1911, the Rangers totaled only 13 men, 7 of which were in A Company. "Hughes [Captain John R., commander of Ranger Company A] reported that his Rangers had good relations with the U.S. cavalry and had made a number of scouts with the troopers, who were actively patrolling the Rio Grande in that area."[50] As is often the case, junior leaders form partnerships for pragmatic reasons when higher authorities are unable to authorize or support such relationships. The same initiative that junior leaders demonstrated in forming partnerships with Rangers translated directly to initiative in future conflicts.

In the decades following the Civil War, the Texas Rangers and other militias were not the only factors to present unique challenges to the Army. Social considerations also played a role in the Army's operations, to include racial tension in the border region after the Civil War. Immediately after the Civil War, the Army began the experiment of racially segregated units and formed two cavalry regiments, the 9th and 10th, and two infantry regiments, the 24th and 25th, of black soldiers under primarily white officers. Performance of military duties was not a problem, as these "Buffalo Soldier" regiments had better discipline and lower desertion rates than other

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[49] Matt Matthews, *Global War on Terrorism Occasional Paper 14, The Posse Comitatus Act and the United States Army: A Historical Perspective* (Fort Leavenworth, Kansas: Combat Studies Institute Press, 2006); Harris and Sadler, *The Texas Rangers and the Mexican Revolution,* 255.

[50] Harris and Sadler, *The Texas Rangers and the Mexican Revolution,* 69.

regiments in the Army during the same time frame.[51] The only issues occurred as a result of tension between the civilian population of a recently slave-owning state and black soldiers. There were few black civilians in Texas before the turn of the 20th century, which resulted in the majority of the black men in the state being armed and in the unenviable position of providing security for a civilian population that simultaneously relied on and resented them.[52] Any racism within the Army manifested itself in employment considerations; one example of this was General O.C. Ord assigning black regiments duties away from major population centers in order to improve relations with the Mexicans living in the American south. [53] Black units also tended to be assigned duty farther out in the frontier for no given reason other than their assumed ability to tolerate heat and austere climates, and they were rotated to other assignments far less frequently than their white counterparts.[54] The latent racism in the Army reflected society, although men like Colonel Benjamin Grierson and other officers who directly commanded black units overcame racist culture and became proponents for the equal treatment of black units based on their proficiency. [55] American culture between the Civil War and the Mexican Revolution remained racially charged, but the need to accomplish assigned missions of border security, then interventions into Mexico, ensured that the Buffalo Soldiers would be continuously able to demonstrate their worth.[56] Society was much slower to integrate African-Americans, as there was very little racial equality for over one hundred years after the slaves' emancipation. Buffalo

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[51] William H. Leckie, *The Buffalo Soldiers: A Narrative of the Negro Cavalry in the West* (Norman, OK: University of Oklahoma Press, 1967), 258; George B. Rodney, *As a Cavalryman Remembers* (Caldwell, ID: Caxton Printers, Ltd., 1944), 248-251; Horne, *Black and Brown: African Americans and the Mexican Revolution, 1910-1920*, 91.

[52] Horne, *Black and Brown*, 100.

[53] Metz, *Border*, 153.

[54] Horne, *Black and Brown*, 97.

[55] William H. Leckie and Shirley A. Leckie, *The Buffalo Soldiers: A Narrative of the Black Cavalry in the West*, rev. ed. (Norman, OK: University of Oklahoma Press, 2003), 238.

[56] Horne, *Black and Brown*, 96-97.

Soldier performance along the border and during the Mexican Revolution, as good as it was, was insufficient to increase their integration in the Army. The racial tension evident with the formation of the Buffalo Soldier regiments shaped operations in the First World War with the employment of black units. General John J. Pershing detached to the French elements of the 93d Division who performed exceptionally well; the 92d Division, remaining under U.S. control, was not as well employed or commended, possibly because of racial tension between American commanders and the black units.[57]

Major Operations: Intervention in the Mexican Revolution

In 1910, the long-time President Porfirio Díaz of Mexico was up for reelection. Despite having originally run on a "No Reelection" platform, he had repeatedly been extended in office since taking power in 1884.[58] Popular will in 1910 was against reelection, due mostly to the efforts of Francisco Madero, who ran against Díaz and lost by an official tally of ninety-nine percent. The obviously rigged election caused more outrage in Madero's followers, and incited him to start a revolution against Díaz from the north, with the help of vaqueros and bandits including Francisco "Pancho" Villa. Simultaneously in the south, Emiliano Zapata led poor agrarian workers in a revolt against the land-owners and overseers. While neither Zapata's actions nor Madero's northern revolution would have been an existential threat for Díaz' government, the conservative component of the public demanded that Díaz combat Zapata in the south. This gave Madero the opportunity to expand influence in the northern state of Chihuahua, and to take over Ciudad Juarez in the spring of 1911. This victory was a major psychological victory, but more importantly it secured a port of entry for weapons from the United States. Porfirio Díaz resigned, after ordering the slaughter of approximately two hundred angry demonstrators, and left for

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[57] John J. Pershing, *My Experiences in the First World War* (New York: Da Capo Press, 1995), 291; Wilson, *Maneuver and Firepower*, 68.

[58] Fehrenbach, *Fire and Blood: A History of Mexico*, 453.

France. Madero took over the presidency in May 1911.[59] A very bloody decade was just beginning in Mexico, and the parts that the U.S. Army would play provided valuable training and experience in large-scale deployments and maneuvers.

The first large deployment in response to the growing violence in Mexico did not result in an actual incursion into Mexico, but was in preparation for such an intervention. On March 8, 1911, President Taft ordered 30,000 troops to conduct large-scale maneuvers near the Mexican Border in response to rapidly growing violence south of the border and a raid from Mexico into Arizona that killed two Americans and left eleven injured.[60] The troops, who collectively came to be known as the Maneuver Division, deployed to the border by sea and railroad with their equipment. Some of the units were even equipped with airplanes for the first time in deployed Army history, albeit with only three or four aircraft total. The division was only a unit for a few months in 1911 and its effect on Mexico in unascertainable. However, the actions involved in mobilizing, forming, and deploying such a large number of troops from diverse areas in the United States gave the General Staff and Army services invaluable experience in mobilization and deployment operations, experience which they would build upon only a few years later when even more troops moved toward the Mexican border.[61] The mobilization, which had its shortfalls, drove Army Chief of Staff Major General Leonard Wood to institute widespread reform. The mobilization and subsequent reforms helped shape the Army in 1917.[62]

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[59] Clendenen, *Blood on the Border,* 491-497.

[60] Eisenhower, *Intervention!,* 6; Clendenen, *Blood on the Border,* 146.

[61] Clendenen, *Blood on the Border,* 150.

[62] Based on observations of the Maneuver Division, Brigadier General Tasker H. Bliss discussed multiple reforms to the Army's mobilization procedures, to include use of civilian rail systems and the assembly and training of mobilized units. Tasker H. Bliss, "Mobilization and Maneuvers," *Journal of the Military Service Institution* (March-April 1912): 174-177; Thomas F. Burdett, "Mobilizations of 1911 and 1913: Their Role in the Development of the Modern Army" *Military Review* (July 1974): 71-72; Ronald J. Barr, *The Progressive Army* (New York: St. Martin's Press, 1998), 185.

In Mexico in 1911, Francisco Madero consolidated enough control for his administration to survive, but not for long. In 1913, as a result of several factors, Madero was ousted from office and murdered by General Victoriano Huerta. The method of his removal from office rendered him a martyr in the eyes of the Mexican people and the U.S. government alike. President-elect Woodrow Wilson desired to remove Huerta from power, which manifested itself through monetary and materiel support to Huerta's foes, the Constitutionalists, led by Venustiano Carranza.[63] The military elements of the revolution in early 1914 still comprised of Zapata in the south, and in the north forces under General Álvaro Obregón and Pancho Villa. Wilson's policies against the Huerta regime translated down into military actions in Mexico and along the Mexican border during the continuing revolution.[64] Two of the major interventions during the Mexican Revolution were the occupation of Veracruz in 1914, and the well-known Expedition led by General John J. Pershing against Pancho Villa's bands in 1916. These interventions, both of which employed ad hoc division-sized forces, may not have had the strategic effects desired by the Wilson administration. For the Army, however, the effects were deep and lasting, as they contributed to the doctrine, training, and organization of the Army that mobilized and entered World War I shortly after the end of the Punitive Expedition.[65]

The Occupation of Veracruz, 1914

The Army had conducted operations around the globe prior to 1914, but had not deployed in large scale since the war with Spain at the turn of the century. In 1914, Victoriano Huerta was still the president of Mexico. Álvaro Obregón and Pancho Villa battled Huerta's army in the northern provinces of Chihuahua and Sonora, while Emiliano Zapata continued to present a

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[63] Mark T. Gilderhus, *The Second Century: U.S.--Latin American Relations Since 1889* (Wilmington, DE: Scholarly Resources Inc, 2000), 41; Jim Lacey, *Pershing* (New York: Palgrave Macmillan, 2008), 78.

[64] Fehrenbach, *Fire and Blood*, 513.

[65] Eisenhower, *Intervention!*, 328.

severely distracting threat to Huerta in the south. Adding to Huerta's problems, President Wilson continued to support the revolutionaries in the north, and worked actively to unseat Huerta from power. Two incidents provided a spark to initiate U.S. direct military action in April, 1914. On April 9, Mexican military detained nine U.S. navy personnel in Tampico, due mostly to a misunderstanding in the midst of hostilities between revolutionaries and Huerta's military. Two days later, Huerta's forces delayed American postal workers and a Department of State courier.[66] Using these relatively minor incidents as at least partial justification, Wilson ordered the seizure of the port city of Veracruz. The purpose of the mission reached farther than retribution for the detention of American sailors and postal workers, however. The port of Veracruz was about to receive a large shipment of arms on the German ship *Ypiranga*, which would aid Huerta against the revolutionaries.[67] President Wilson used the Tampico incident as a stated reason to intervene by ordering the Navy to seize the port city of Veracruz. Intended to damage Huerta's cause, this intervention began when Admiral Frank F. Fletcher seized the port with 787 men early in the morning of April 21, 1914.[68] Fletcher's men took most of the port with no shots fired until late morning, when firing broke out. After two days of fighting and the employment of several thousand more Marines and sailors, Fletcher quelled resistance in the port. After the smoke cleared, nineteen Americans and at least two hundred Mexicans were dead. The city was secure from Huerta's forces, and the *Ypiranga* was in Fletcher's custody.[69]

On April 30, 1914, 3,000 troops commanded by General Frederick Funston of the Army's 2d Division, to include 5th Brigade, landed in Veracruz to relieve Admiral Fletcher of

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[66] Gilderhus, *The Second Century*, 45; Quirk, *An Affair of Honor*, 1.

[67] Quirk, *An Affair of Honor*, 85.

[68] Friedrich Katz, *The Secret War in Mexico: Europe, the United States and the Mexican Revolution* (Chicago: The University of Chicago Press, 1981), 314.

[69] Gilderhus, *The Second Century*, 45; Quirk, *An Affair of Honor*, 96-98.

occupation of the city.[70] The major fighting was complete, and Admiral Fletcher had searched unsuccessfully since seizing the city for its civilian authorities. When Funston took control of the city, he had received no specific orders other than to prevent the transfer of arms to Huerta's men. Many in the U.S. and Mexico alike believed that the occupation of Veracruz was a step towards occupation of Mexico City, but this was not to be. Funston and his men began massive civil affairs operations in Veracruz, which prior to their arrival was a cesspool of disease and filth. The Army's influx of money and personnel resulted in the city being cleaner and healthier than it had been in memory of the residents of the city. In November 1914, Funston received orders to evacuate Veracruz. Within weeks, the city reverted back to its less sanitary state, and showed little sign of American occupation and construction. Venustiano Carranza's Constitutionalists were the only elements geographically close enough to be able to take control of the city, which they did promptly after the U.S. military withdrew. [71]

The effects of the occupation of Veracruz varied in their significance and object. The Mexican Revolution was perhaps the least affected by the occupation. The arms aboard the *Ypiranga* arrived at their final destination intact, but it was too late for them to benefit Huerta, as he was rapidly losing power. The arms shipment or delay thereof did not affect the revolution, and because other ports were operational, shipping to all factions involved in the revolution were largely unaffected by the occupation.[72] The U.S. military action in Veracruz also did not leave a lasting impression on the town of Veracruz itself. For a short time, the city functioned well under sound government, and provided citizens and occupiers alike with all required services. This period of good governance was short-lived, however, and after the American Army evacuated Veracruz in November, 1914, quickly reverted back to its pre-invasion state. The immediate

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[70] Quirk, *An Affair of Honor,* 123.

[71] Ibid.

[72] Eisenhower, *Intervention!*, 328.

effects of the seizure and occupation of Veracruz were most evident in the U.S. military. The Navy and Marines conducted operations on land supported by sea-power, and demonstrated with devastating accuracy the effectiveness of sea-land coordination as ground personnel in direct fire contact brought the guns of the *Chester, Prairie,* and *San Francisco* to bear on Mexican naval cadets firing at them from the naval school in Veracruz.[73] The Navy used military aviation in support of the initial invasion, also, which laid some of the institutional groundwork for later aviation operations in 1916 and beyond.[74] Specific to the Army, General Funston and his men occupied Veracruz with most of a division on April 30, 1914, and, through their effectiveness in conducting stability operations in Veracruz throughout 1914, demonstrated viability of the division organization.[75]

The intervention at Veracruz did not have far-reaching political ramifications other than to deepen Mexican distrust of the U.S., but the effects on the Army were immediate through the addition of another several thousand soldiers and leaders with deployment experience into an ambiguous situation. General Funston employed the 2nd Division in the middle of opposing sides of the Mexican Revolution with little strategic guidance, in an environment that required initiative at all levels and expeditionary logistics that would serve the Army well during its upcoming major deployment to Europe.

The Punitive Expedition, 1916

Brigadier General John J. Pershing led the second and largest American intervention into Mexico during the Mexican Revolution in 1916, as the Mexican Revolution continued in full force, although with different form. Pancho Villa had split from Carranza in November, 1914. Obregón, still in command of Carranza's forces in the north, defeated Villa several times in 1915,

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[73] Quirk, *An Affair of Honor,* 101.

[74] Johnson, *Wingless Eagle,* 159.

[75] Wilson, *Maneuver and Firepower,* 35.

and reduced him back to being a bandit leader by the end of that year. Carranza continued to gain political support, and became president in 1915.[76] Pancho Villa, who had enjoyed U.S. support during the initial movement against Huerta, found himself on the wrong side of U.S. policy. In January 1916, according to a letter to Zapata, Villa had shifted his military efforts and political opposition from Carranza to the United States. He believed that the U.S. was partnering with Carranza against the interests of the Mexican people, and that he would "make them know that Mexico is the land for the free and the tomb for thrones, crowns, and traitors.[77]

Villa and his men continued to raid on both sides of the border, as they had done throughout the decade. He increased anti-American rhetoric and actions, which reached a crescendo in early 1916. In January 1916, his men pulled 18 Americans from a train in Chihuaha and summarily executed all except one of them, while leaving the 20 Mexicans aboard the train unharmed.[78] Although political pressure increased on the Wilson administration to intervene, there was still insufficient reason to invade until Villa conducted a large raid on Columbus, New Mexico, on March 9, 1916. The raid undoubtedly stemmed from several purposes, the most likely of which was revealed to an El Paso journalist by one of Villa's captured lieutenants. Pablo López, the Villista in Carrancista custody, stated that Villa was attempting to provoke the United States into invading Mexico as a method of uniting Mexico against a common enemy, instead of allowing the U.S. to continue to pit factions against each other in Mexico until the "country

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[76] Katz, *The Secret War in Mexico*, 268-274.

[77] Eileen Welsome, *The General and the Jaguar: Pershing's Hunt for Pancho Villa: A True Story of Revolution and Revenge* (New York: Little, Brown, 2006), 61.

[78] Friedrich Katz, *The Life and Times of Pancho Villa* (Stanford, California: Stanford University Press, 1998), 558-560.

would fall like a ripe pear into their [U.S.] hands." Regardless of Villa's long-term purpose for the raid, it succeeded in prompting a U.S. intervention.[79]

Villa's raid caught Colonel Herbert Slocum's garrison at Columbus by surprise; Colonel Slocum had reports of Villa's imminent cross-border raid, but they were confused with several conflicting reports of Villa's location and intentions.[80] Villa and approximately 450 of his men assaulted Columbus at three o'clock in the morning of March 9. Civilians in Columbus and Colonel Slocum's men killed several Villistas and repelled the raid. Major Frank Tompkins, who was also stationed at Columbus, took 32 cavalry soldiers and pursued the fleeing raiders, killing several of them over the fifteen miles south of Columbus.[81] Overall, 18 American civilians and soldiers were killed and 10 wounded, and according to Colonel Slocum's reports approximately 75 raiders were killed in the town and while fleeing. Other estimates place Villa's losses at closer to 200.[82]

The raid on Columbus was the spark that prompted the President to order an expedition south into Mexico.[83] The order came from President Wilson to General Funston, then the

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[79] *El Paso Herald*, May 25, 1916, quoted in Katz, *The Life and Times of Pancho Villa,* 553; Welsome, *The General and the Jaguar,* 116; Katz *Life and Times of Pancho Villa,* 554, 884. Theories of external prompting for the Columbus raid vary widely and include theories of a conspiracy of American businessmen and German plots. According to Katz, a secondary reason for the raid is a desire for revenge for bad business dealings with Sam Ravel, who lived in Columbus and traded on both sides of the border.

[80] Welsome, *The General and the Jaguar,* 105.

[81] Metz, *Border*, 224.

[82] Lacey, *Pershing*, 77; Welsome, *The General and the Jaguar,* 133-134; Johnson, *Wingless Eagle,* 161-162.

[83] There were contributing reasons for the intervention other than the raid on Columbus. For instance, many Texans and other Americans had invested heavily in oil in Mexico. The Revolution disrupted economic activity and profits for all of the oil companies, and threatened the physical safety of the American workers and facilities in Mexico. In 1913, the Texas Company in Mexico described the situation and demanded intervention in a letter to Colonel Edward Mandel House, who was one of President Wilson's chief advisers, saying "We all believe here that there is but one solution of this difficulty, and that is American intervention." John M. Hart, *Empire and Revolution: The Americans in Mexico since the Civil War* (Ewing, NJ: University of California Press, 2002), 306, 342. American concern

commander of the Southern Department, on 10 March, and instructed him to take action to pursue the raiders responsible for the destruction in Columbus, specifically Pancho Villa's band.[84] By March 14, General Pershing under the Southern Department had organized his force of approximately eleven thousand men and prepared to advance into Mexico on the morning of March 15.[85] The elements of the Army assigned to Pershing for the Punitive Expedition differed from divisions as outlined in the Army's *Field Service Regulations*. Pershing's force consisted of two provisional cavalry brigades, which were comprised of two cavalry regiments and a field artillery battery each, and one infantry brigade which consisted of two regiments and two engineer companies. At division level, Pershing had with him medical, signal, transportation, and air units. The design of this division took shape outside of the regulations by design, as it was formed to adapt to the expected area of operations. In the wastelands of northern Mexico, Pershing planned to use cavalry to pursue the bandits, and to protect his lines of communication with infantry.[86] He formed his staff and the force quickly, in only three days, and marched south.

The first fight that most closely accomplished Pershing's assigned mission took place on March 29, 1916, at Guerrero, Chihuahua. One of Pershing's column commanders, Colonel George A. Dodd, received a report that Villa and a few hundred of his men were within reach. Even though he had already marched his men 375 miles in 13 days, he quickly moved another 50 miles to the suspected location and attacked. Because he was unaware of the raiders' disposition the vast majority of them escaped, but the bandits never formed as large of a unit following that

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with protecting economic interests in Mexico is further indicated by the negotiations at the end of the Punitive Expedition, which included a clause allowing the U.S. to use military force to protect its interests should the Mexican government fail to do so. Katz, *The Life and Times of Pancho Villa*, 579.

[84] John J. Pershing, "Punitive Expedition," (Colonia Dublan, Mexico, October 10, 1916), 3.

[85] United States Department of State, "The Adjutant General to General Funston" in *Papers Relating to the Foreign Relations of the United States, 1916* (Washington, D.C.: Government Printing Office, 1916), 489; Metz, *Border*, 225.

[86] Wilson, *Maneuver and Firepower*, 35.

attack, thus accomplishing much of Pershing's assignment.[87] Over the next few months, there were several other fights, most of them minor. The Villistas never assembled in groups over 150 after the Guerrero fight. The Expedition spent the next ten months searching northern Mexico for Villa and his men, with the result of accomplishing their mission of disintegrating Villa's bandits.

The Mexican population was adamantly opposed to the intervention, as was the Carranza government. General Obregón had issued a proclamation in affected areas that the American Army was allowed to operate in pursuit of Villa, but this had little effect on the civilians and, in one case, not enough effect on Carrancista soldiers to keep peace between the American and Mexican armies. On April 12, 1916, near the town of Parral, the civilian population of the town and the Mexican soldiers garrisoned there attacked the 160-man cavalry detachment under Major Tompkins. Approximately 300 Mexicans pursued Tompkins and his men 16 miles, after which time Tompkins maneuvered to foil the pursuit by killing at least 40 of his pursuers.[88] General Pershing was complimentary of Tompkin's actions, but he continued to warn his men to avoid engagements with any Mexicans other than Villistas while being wary of any Mexican officials while they searched for Villa.[89] Pershing himself was directly involved in a conflict with the Mexican military, albeit only in writing, in June. General J. B. Treviño, the commander of the Mexican Army in Chihuahua, sent Pershing a telegram warning him to leave the country or be attacked. Pershing replied quickly, dismissing the threats and placing the responsibility on the Mexican government for any American reprisal to attacks by Mexican forces.[90]

The Punitive Expedition differed in several important ways from previous military operations on the Mexican border or in Mexico. The primary difference between Pershing's

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[87] Pershing, "Punitive Expedition," 14.

[88] Ibid., 21-22; Benjamin D. Foulois, *From the Wright Brothers to the Astronauts: The Memoirs of Major General Benjamin D. Foulois* (New York: McGraw-Hill, 1968), 133.

[89] Pershing, "Punitive Expedition," 25.

[90] Ibid., 30.

expedition and previous Army operations was the mechanization of his columns. Pershing had the first combined arms task force in American history, to include infantry, cavalry, engineers, trucks, artillery pieces, signal equipment, and even eight airplanes from the Army's 1st Aero Squadron.[91] Pershing's two companies of engineers worked primarily to establish and maintain trafficable roads, which in the Chihuahuan desert was difficult even under dry conditions, and became nearly impossible during the wet season. Complicating the matter was the inexperience in the Army of military engineering in support of a mechanized force. According to Pershing's report, "The personnel of the Engineer battalion entered Mexico with no knowledge of road construction of this nature, as nothing exactly like it had ever come under the experience of any of its officers."[92] Mechanization significantly affected logistics, also. Before the Expedition, Pershing's quartermaster and ordnance officers were accustomed to the difficulties of operating at the end of long supply lines with a horse-drawn army that could conduct limiting foraging. They quickly found, however, that the level of difficulty of supplying an army in the field increases dramatically with the need for parts, fuel, and other supplies necessary to keep several different types of mechanized equipment operational.[93] Figure 1 below shows a common, but at that time only recently observed, phenomena of a logistics convoy traversing one of the more trafficable roads in Pershing's area of operations.

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[91] Foulois, *From the Wright Brothers to the Astronauts: The Memoirs of Major General Benjamin D. Foulois* (New York: McGraw-Hill, 1968), 118-129. The aircraft assigned to Pershing for this mission were eight Curtiss JN2's, which were extremely underpowered for missions in adverse weather and high altitudes that characterized flying in Mexico. The dry weather was hard on the wooden propellers, also, which was only partially mitigated by relocating propeller manufacturing capability to the nearer Columbus, NM. The entire Army aviation section had only 12 flyable planes total in 1916, most of which were rendered inoperable by crashes or maintenance problems early into the Punitive Expedition. Two of Pershing's eight planes crashed in the first two days in Mexico.

[92] Pershing, "Punitive Expedition," 40.

[93] Ibid., 56-65 and 75-79; George A. Millard, "U.S. Army Logistics During the Mexican Punitive Expedition of 1916," Military Review (Oct 1980): 64-65.

Figure 1: Supply Trains in Mexico[94]

The Expedition also saw increased use of innovative communications. The signal personnel learned valuable lessons after struggling to provide communications between all of the far-spread forces on the Expedition, in addition to communications back to San Antonio, Texas. The signal detachment, which laid and maintained a single telegraph line of 325 miles, as well as operated and maintained several radio sets, made recommendations to the War Department through Pershing's report on the Expedition for changes in the manning, equipping, training, and employment of signal units in divisions.[95] In addition to voice communications, the signal detachment was also responsible for the airplanes on the Expedition. In its initial execution order, the War Department had instructed Pershing to make all possible use of airplanes for observation.[96] Pershing and his subordinate commanders used airplanes as directed, and also as couriers, as evidenced by Pershing's recount of using planes to redirect columns after they had

[94] Free Republic, http://www.freerepublic.com/focus/f-vetscor/892090/posts (accessed January 27, 2011).

[95] Pershing, "Punitive Expedition," 84.

[96] Ibid., 3.

moved beyond signal range.[97] The use of fixed wing aviation laid the foundation for aviation in the American military. Major B.D. Foulois, the commander of Pershing's air detachment, made the first aerial reconnaissance flight over foreign territory in March 1916. At the end of the Expedition, he wrote that "the experience gained by the commissioned and enlisted personnel of this command while on active duty with the Punitive Expedition, has been of the greatest value, and it is believed that the knowledge gained by all concerned should result in more rapid and efficient development of the aviation service in the United States Army."[98] Other lessons learned by the aviation in the Punitive Expedition included the superiority of aerial reconnaissance over horse cavalry reconnaissance, and the necessity of aviation ground support. An aviation squadron with only aircraft was found to not be a viable unit, as all of the systems for maintenance, supply, and operation are required for an aviation unit to be effective.[99]

The Punitive Expedition ended on February 5, 1917, after almost 11 months since the raid on Columbus.[100] The Expedition accomplished its mission of disintegrating Villa's bands, rendering the mission an operational success. At the policy level, Pershing's operation suffered a similar fate to Funston's occupation of Veracruz in 1914. The Mexican Revolution continued according to Mexican influences, not the will of the American President. Furthermore, the intervention in 1916 compounded the ill effects on Mexican consideration of the U.S., which had been characterized by mistrust since President Wilson's initial patronizing attempts to help Venustiano Carranza. In both cases of intervention, the ostensible beneficiary wanted the U.S. out of Mexico. His stubborn refusal of unwanted U.S. intervention in his revolutionary efforts

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[97] Ibid., 20; Johnson, *Wingless Eagle*, 169.

[98] Foulois, *From the Wright Brothers to the Astronauts: The Memoirs of Major General Benjamin D. Foulois*, 126; Pershing, "Punitive Expedition," 85; Roger G. Miller, *A Preliminary to War: The 1st Aero Squadron and the Mexican Punitive Expedition of 1916* (Washington, D.C.: Air Force History and Museums Program, 2003), 51.

[99] Johnson, *Wingless Eagle*, 169; Harry Aubrey Toulmin, *With Pershing in Mexico* (Harrisburg, PA: The Military Service Publishing Co., 1935), 125.

[100] Welsome, *The General and the Jaguar*, 309.

resulted in the U.S. leaving Mexico without accomplishing Wilson's goals in either 1914 or 1916.[101]

More important than policy to the U.S. Army in the years immediately following the Punitive Expedition, however, were the lessons learned while in Mexico. The first mechanized combined arms division in American history deployed in barren, hostile terrain against an elusive enemy operating in a complicated human and natural terrain. The Army gained a cadre of officers and enlisted men that had already faced the new challenges presented by mechanized warfare, and as a result were able to move massive amounts of men, supplies, and equipment into Europe faster than Germany could anticipate in 1917. The lessons learned by the officers of the artillery, logistics, engineer, signal, and air elements applied directly to the success of the American Army in World War I.[102] The men on the Punitive Expedition "closed the Mexican chapter with the dawn of the new year of 1917. The officers and men of the campaign were hardened, trained and prepared for the great events of the next two years in France, Italy and Siberia."[103]

The Army in 1917: World War I

Europe became embroiled in war in 1914, and by 1917 the war was going poorly for the Allies. Russia had been forced out of the conflict, and the British and French armies suffered massive losses to German defenses. In the U.S., movement toward building up the Army started before the Mexican interventions due to the war in Europe combined with publicized American casualties in Europe and the Atlantic. Even with the influence of events in Europe, however, it is unlikely that legislation to build up the military would have passed Congress without the events in Mexico. These Mexican interventions, after decades of border security, helped push legislation through Congress that reorganized and built up the military through the National Defense Act of

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[101] Katz, *The Secret War in Mexico*, 314.

[102] Clendenen, *Blood on the Border*, 358-359.

[103] Toulmin, *With Pershing in Mexico*, 127.

1916.[104] The Mexican interventions of 1914 and 1916 affected the Army even more at the operational level than at the national level, however, as the veterans of the interventions became the first to deploy to Europe while also dispersing as training cadre throughout the expanding Army. The American Army that fought World War I reflected influence of earlier operations on the Mexican border in its doctrine, organization, and training.

Doctrine

The capstone of Army doctrine in 1917 was the Field Service Regulations (FSR), the most recent version of which had been published in 1914. The FSR of 1914 set guidelines for the employment of a large unit in the field, and was geared toward open maneuver warfare, not the trench warfare of Europe in 1917. The FSR of 1914 applied to the Army as it prepared to enter World War I in its emphasis on combined arms between infantry, cavalry, and artillery, with support from engineer, aviation, signal, and all aspects of the quartermaster activities.[105] The methods of employment of the combat arms units in concert with the combat support and service units changed with technology and other organizational changes, but remained a governing principle of Army operations from actions in Mexico through World War I and beyond. Other documents governing employment of Army units included cavalry regulations from 1914, although these applied neither to operations in Mexico nor to operations in Europe.[106] The

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[104] Weigley, *History of the United States Army*, 347; Johnson, *Wingless Eagle*, 175.

[105] *Field Service Regulations, United States Army, 1914; Corrected to July 31, 1918* (Washington, D.C.: Government Printing Office, 1918), 73-77.

[106] Cavalry regulations, such as *General Principles of the Employment of Cavalry* (Fort Leavenworth, KS: The General Service Schools Press, 1920), were published in 1914 and reprinted in 1920, but focused primarily on horse cavalry which was not useful during American participation in World War I. The cavalry doctrine taught at Fort Leavenworth applied only to obsolete horse cavalry with no mention of motorized infantry or the need for automotive transport. It is worth noting that more progressive cavalry leaders saw motorization as a change in transportation but not in tactics or doctrine of employment of cavalry. Second Lieutenant George Patton is credited with the first mechanized cavalry combat action in May 1916 as recounted in a letter to his father, reprinted by Martin Blumenson, *The Patton Papers 1885-1940*, (Houghton Mifflin Company: Boston, 1972), 331-337. Colonel Toulmin bases much of his book

doctrine of the Army at the onset of World War I was written primarily to govern large-scale conflicts between large units, and was not useful for most of the Army's experiences along the Mexican border before World War I. The exception to the irrelevance of the FSR to the Mexican border was both the most formative and the most recent experience prior to World War I, however. Pershing used the principles found in the 1914 FSR throughout the Punitive Expedition, then again in the high intensity conflict in Europe.

Organization

In addition to Army doctrine, operations in Mexico also affected the organization of the American Army that entered World War I, specifically with regard to mobilization and employment of the National Guard and the structure of the division. The National Guard was mobilized by the federal government for the first time to secure the Mexican border after Pershing led the preponderance of the regular forces that had been guarding the border into Mexico.[107] The same act of Congress that authorized the President to federalize the state National Guard elements also made the division structure permanent for the first time, and set the conditions for the division to be the primary unit of action in World War I. The permanent structure came about after a perceived need by Army leadership and Congressional agreement in 1916, and was based on lessons learned in expeditions into Mexico balanced against observations of the war in Europe.

When the Punitive Expedition crossed the border in pursuit of Pancho Villa in 1916, President Wilson mobilized the National Guard and placed them under the purview of the General Staff for the first time, only two weeks after the National Defense Authorization Act of 1916 gave him authority to do so. In response to requests from Generals Hugh Scott and

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With Pershing in Mexico on that same concept motorized cavalry filling the same roles as traditional horse cavalry.

[107] United States Department of War, *Annual Report of the Secretary of War, 1916* (Washington, D.C.: Government Printing Office, 1916), 1:11.

Frederick Funston, Wilson first mobilized the National Guard units of three southwest border states in May 1916, then added to their numbers from other states in June.[108] The Guard ordered into service responded, but was 100,000 short of their authorized war strength and had many new men who could not fire a military rifle, let alone operate as part of a larger unit. The National Guard had persistent difficulty in filling the gaps in their ranks left by those who could not pass physicals or refused to enter federal service.[109] The mobilization also demonstrated that the Guard did not have sufficient cavalry, engineers, artillery, or other special troops needed to support its infantry units. The mobilization demonstrated serious shortfalls and inconsistencies in the Guard, which required centralized reorganization and several months of Regular Army-led training to remedy. The organization of the National Guard improved on the next mobilization, which contributed to the massive nation-wide mobilization for World War I.

Another major organizational characteristic of the Army that came about, at least in part, as a result of operations in Mexico was the division structure. The National Defense Authorization Act of 1916 stipulated the division structure based on observations of potential needs in Mexico, as well as observations of the war in Europe in 1916. The Army did not have sufficient time to perfect the division structure before entering World War I, but the legal and regulatory framework was in place as a result of operations in Mexico.[110] The Army formed the 1st Division from veteran Regular Army regiments, then formed further divisions in accordance with Tables of Organization and Equipment for deployment to Europe.

The structure of the American division became permanent in 1917. The British and the French strongly requested American presence on the Western Front, regardless of how small that force might be, to signify the promise of a larger contribution and thus improve sagging Allied

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[108] Clendenen, *Blood on the Border*, 287; Abrahamson, *America Arms for a New Century*, 111.

[109] Edward M. Coffman, *The War to End All Wars: The American Military Experience in World War I* (Lexington, KY: University Press of Kentucky, 1998), 13.

[110] Wilson, *Maneuver and Firepower*, 42.

morale. The Europeans primarily wanted to use Americans as troop replacements for their badly drained units, a plan vehemently opposed by American leadership. As an alternative to providing individual replacements, Army Chief of Staff Major General Hugh L. Scott directed the War College Division to determine how to reorganize the Army division to meet the needs of fighting in Europe. Because the war in 1917 was not a war of maneuver, but was characterized instead by static trench fighting, the War College designed the division to have an abundance of infantry and little cavalry. Although this lower cavalry to infantry ratio differed significantly from the Punitive Expedition organization, the War College Division relied heavily on lessons learned and organizations employed during the Punitive Expedition to assign combat service and service support organizations to the division. The proposed division was to have organic engineer, signal, medical, and aviation units in order to allow each division to operate independently, just as Pershing did in Mexico.[111]

While the Army was designing the structure of the new standardized division, the U.S. sent a force to Europe in June 1917 in response to the British and French requests. The Army in early 1917 was in the midst of expanding greatly, and as such consisted mostly of untrained, ill-equipped, and unorganized personnel in what would become the National Guard and the Reserves. The Army was struggling with these and other issues inherent to such a large-scale mobilization when it sent the first American troop formations to Europe. In May 1917, Major General Scott alerted Major General Pershing, who had recently taken command of the Southern Department after Major General Funston's unexpected death, of the requirement to lead a small expeditionary force to Europe to provide a token American presence.[112] The War Department sent the 16th, 18th, 26th, and 28th Infantry Regiments to make up the 1st Division in June.

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[111] Ibid., 47-49.

[112] Ibid., 49.

The 1st Division consisted of units straight from the Mexican Border, and reflected its recent operations in Mexico in several ways, one of which was the autonomy of its commander. Pershing, as the commander of the U.S. forces in Europe, wielded more authority delegated from Secretary of War Newton Baker than generals usually received. This is likely due to his demonstrated competence, dependability, and autonomy during the Punitive Expedition.[113] Other characteristics of the division in World War I also stemmed from operations in Mexico. The First World War witnessed more coordination among the combat arms, combat support, and combat service organizations than ever before. As examples, infantry could not advance without support from engineers and artillery, and artillery could not continue to fire without a constant supply of ammunition. Transportation and signal units provided the vital materiel and command connections, while medical units administered to the needs of the wounded.[114] Even with these innovations, the 1st Division was not a smoothly functioning combined arms team from its inception. Before deploying, it was first stripped of hundreds of its soldiers to train newly formed units elsewhere in the Army. Another problem was that soldiers were not trained on new equipment. Newly formed crews for howitzers, mortars, and 37-mm guns had neither the equipment nor even familiarization training on their new systems when they deployed.[115] Despite the problems inherent to the formation of a new unit structure formed and deployed in such an unprecedented and rapid manner, the Army formalized, refined, and used to great effectiveness more divisions based on the same capabilities first exercised first in Mexico. The expansion of the Army to stand up new divisions was not a smooth process, but it would have been more difficult if not impossible without the experiences gained on the Mexican border. The truck fleet alone

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[113] Weigley, *History of the United States Army*, 377; Johnson, *Wingless Eagle*, 172.

[114] Wilson, *Maneuver and Firepower: The Evolution of Divisions and Separate Brigades*, 73.

[115] Weigley, *History of the United States Army*, 356.

expanded from 600 trucks in the June of 1916 to over 82,000 by June 1918, and other elements of the Army expanded on similar scales.[116]

Formalized relationships between combat and support units in World War I grew as a result of their employment during operations in Mexico. Aviation, which was only a small part of the signal detachment in 1916, expanded during World War I from fifty-five mostly obsolete planes in the Aviation Section to forty-five aviation squadrons on the front when the Armistice was signed.[117] Aviation would have grown in use with or without operations in Mexico, but the experience of aviation and ground personnel working together to deploy, operate, and maintain airplanes was invaluable as the aviation branch developed during the War.[118] Although the aircraft were inoperable for the majority of the Punitive Expedition, the knowledge gained by the ground personnel and aviation leadership greatly informed the requirements to rapidly build a robust aviation section immediately after the Punitive Expedition.[119] The poor performance of aviation in Mexico ironically benefited the branch, as there was public outcry for Congress to increase funding to Army aviation in 1916.[120] Relationships between service support units and supported combat units also changed dramatically during World War I, beginning with the formal attachment of quartermaster, ordnance, transportation, and medical units to the division. Pershing's expedition, which was the first independent large operation with motorized transport and the accompanying logistical demands, demonstrated the need for all of these units to be an organic part of an independent command.

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[116] United States Department of War, *Annual Report of the Secretary of War, 1916*, 1:195; United States Department of War, *Annual Report of the Secretary of War, 1918* (Washington, D.C.: Government Printing Office, 1916), 1:40; Jeff Jore, "Pershing's Mission in Mexico: Logistics and Preparation for the War in Europe," *Military Affairs* 52, no. 3 (July 1988): 119.

[117] Ibid., 363.

[118] Pershing, "Punitive Expedition," 85.

[119] Foulois, *From the Wright Brothers to the Astronauts*, 133.

[120] Johnson, *Wingless Eagle*, 177.

Training

Army training immediately prior to and during World War I was also deeply affected by lessons learned on the Mexican border. Pershing used the same methodology and focus on training in Europe with new units and personnel as he had before deploying to Europe, but on a broader level the Army that entered World War I benefited from characteristics of Army-wide education stemming from operations in Mexico. Army-run schools, especially officer schools in the Regular Army before World War I, trained too few officers for the war. However, those who were trained proved to be highly competent staff and commanding officers. The instructors at these schools were all veterans of interventions in Mexico, border security operations, or both. Many of the Regular Army officers that taught and graduated from Army schools before World War I filled positions significantly higher than their peacetime ranks during the Army's expansion, which gave them, and their collective experience concerning Mexico, considerable influence over much of the US military and operations in Europe.[121] In addition, American officers deploying to Europe were subject to unfounded criticism of their education levels from their European counterparts. Although the American officers had not commanded divisions or corps as many would in Europe, the combination of operations along the Mexican border combined with instruction at Fort Leavenworth gave them more of an understanding of European militaries and requirements than the Europeans had of the American military.[122]

In addition to officer training, tactical training of American soldiers and small units differed significantly from that of their European counterparts. At the individual soldier level, a training benefit from both high and low intensity operations in the borderlands and in Mexico was marksmanship. The Army did not have as much experience with large weapons and large unit tactics as their European counterparts, but the culture of the American Southwest required

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[121] Weigley, *History of the United States Army,* 387.

[122] Nenninger, *The Leavenworth Schools and the Old Army,* 156.

individual soldiers to be expert marksmen and to train accordingly. The American Army was the only one that required each soldier to shoot for record, a reflection of decentralized low-intensity operations against Indians and bandits on the Mexican border.[123] Marksmanship was one of many topics of training in 1916; troops on the border as well as on the expedition trained in military tasks from mechanized resupply to field sanitation, and shared their experiences through training and contributions to military journals.[124]

Many American small units were also trained very quickly and effectively during the National Guard mobilization in 1916 to the Mexican border. When Pershing went south into Mexico, Wilson mobilized the Guard of three southwest border states in May 1916, then added to their numbers from other states in June.[125] This mobilization found the National Guard lacking in standardized training and ability to work as part of a larger federal army. The Regular Army cadre assigned with the National Guard trained the recently mobilized Guardsmen and, in an unprecedented manner, imposed its strict training and discipline on state soldiers.[126] National Guard units were undermanned, underequipped, and not trained to the Regular Army standards, as evidenced by one active duty trainer's recollection of a cavalry regiment:

> That instead of having a full complement of partially trained men and horses, at peace strength, and the increment to war strength of recruits with the necessary equipment, they had no horses, except some officer's private mounts; of the 1,172 enlisted men, 337 were brand new recruits, 245 others had been in the Guard for less than two months, and 679

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[123] Weigley, *History of the United States Army,* 391.

[124] Review of *Field Sanitation and Hygiene,* by Joseph H. Ford, *Journal of the United States Cavalry Association* XXVIII, no. 118 (April 1918): 573. Colonel Ford based his field sanitation book for the Army on his observations and experiences on the Mexican Border and while on the Punitive Expedition.

[125] Abrahamson, *America Arms for a New Century,* 111.

[126] Jerry Cooper, "The National Guard Mobilizations of 1916 and 1917: The Historical Implications," in *Cantigny at Seventy-Five: A Professional Discussion* (Wheaton, Illinois: Robert R. McCormick Tribune Foundation, 1993), 40-41.

had never attended an encampment and know practically nothing about camp life, and there was a shortage of equipment of all kinds.[127]

The author goes on the describe the effects of mass vaccinations for typhoid and small-pox, which were temporarily very detrimental to readiness until the soldiers recovered from the side effects. These side effects, like the myriad of training issues faced by the newly federalized troops, were experienced in 1916 and thus minimized in 1917.

The mobilization to the Mexican border served as a rehearsal for the mobilization a year later for deployment to World War I for several reasons, but it also served to train a large portion of the National Guard in the regimen that they would apply as part of the American Expeditionary Forces. At one month into their training, General Tasker H. Bliss inspected the Guard units and found that most of the units had yet to begin serious tactical instruction. He considered it "a matter of profound gratification to the country that it was unnecessary to attempt to use them for immediate service, even for defensive purposes, at this time." [128] After the next few months of drilling on the border, however, the National Guard elements became more professional and well-trained. The Guardsmen deployed to the border in 1916 were only a portion of the troops to be mobilized in 1917, but their experiences added a training and knowledge base from which the rest of the Army could build. The mobilization gave the Army a one-year start on preparing for World War I, without which it would likely not have entered the war as effectively.[129]

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[127] George Grunert, "Training National Guard Cavalry." *Journal of the United States Cavalry Association* XXVIII, no. 115 (July 1917): 10.

[128] Tasker H. Bliss, "Inspection of the Organized Militia along the Mexican Border" (Report to the Adjutant General, August 11, 1916, Bliss Papers, Library of Congress, First Period, Correspondence, vol. 204), quoted in Abrahamson, *America Arms for a New Century,* 111.

[129] Lacey, *Pershing,* 82; Jeff Jore, "Pershing's Mission in Mexico: Logistics and Preparation for the War in Europe" *Military Affairs* 52, no. 3 (July 1988): 121.

Planning

Planning systems and institutions prior to World War I focused on Mexico. Unlike the other Army activities of doctrine, organization, and training, however, planning did not significantly affect the Army's preparation for World War I. Planning for global contingencies, specifically in Mexico, nonetheless bears examination because of the significant Army planning efforts and the implicit benefits of staff training from assembling strategic and operational plans. The Army planning institutions prior to World War I included the Army War College and the General Staff. The Army War College was first established in November of 1901. Brigadier-General Tasker H. Bliss, the first president of the Army War College, believed that the role of the institution was to devise plans "relating to the question of military preparation and movement in time of war."[130] This was belief was confirmed in 1908 by Secretary of War Elihu Root, who told the War College, "You have been brought together to do the thinking for the Army."[131] Another institution developed shortly after the War College was the General Staff, which became responsible for military planning upon its establishment in August of 1903.[132] The General Staff and the Army War College devised a system of "color plans" which assigned a different color to plans relating to several different contingencies. The plans for Mexican contingencies consolidated into Plan Green, which called for a large-scale invasion of Mexico with the intent to occupy and perhaps annex the neighboring country.

The Army War College and General Staff began detailed planning for an invasion into Mexico 1904, shortly after which specific requirements were determined for an amphibious

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[130] Army War College, Archives, Bliss Papers, Box 12, quoted in Steven T. Ross, *American War Plans, 1890-1939* (Portland, OR: Frank Cass Publishers, 2002), 27.

[131] Stetson Conn, *The Army War College 1899-1940: Mission, Purpose, Objectives. A Study Prepared for the Commandant* (U.S. Army Center of Military History, Historical Records Collection 352, Army War College, December 1964), 1, quoted in Henry G. Gole, *The Road to Rainbow: Army Planning for Global War, 1934-1940* (Annapolis, MD: Naval Institute Press, 2003), 18.

[132] Ross, *American War Plans, 1890-1939,* 28.

invasion of Veracruz and a land-based invasion across the Rio Grande. Regular forces would not have been sufficient to invade, which in the earlier versions of Plan Green was mitigated by assuming that eight divisions of National Guard troops would augment the regular forces.[133] In the years to come, more planning followed, although the U.S. never executed Plan Green. Even the 1914 occupation of Veracruz and the 1916 Punitive Expedition were only hasty reactions to current political issues, and were not related to Plan Green. The Army never invaded Mexico in accordance with Plan Green, which would have required more assets than the United States had or was willing to use. Similar to many of the other color plans, invasion of Mexico was also never in line with American policy. Plans against Mexico were, nonetheless, useful in teaching planning for modern war and were best used as practical education for planning staffs.[134]

Upon its entry into World War I, the American Army reflected influence of earlier operations on the Mexican border in its doctrine, organization, and training. The governing Army doctrine after decades of border security and two major interventions into Mexico was general enough to apply to operations in Europe as well as in North America. The organization of the Army changed significantly because of the advent of automotive and aviation technology, which the Army used for the first time in the Punitive Expedition of 1916. The division structure became standardized and permanent at the onset of World War I, and it came about as a result of the interventions into Mexico. The Army's training programs and schools that prepared a generation of leaders to operate in Europe came about as a result of operations along the border, also. The Army's focus for the decades between the Civil War and World War I was primarily toward Mexico, and when the focus of the Army transferred to Europe the influence of operations in Mexico played a major role in the preparation, deployment, and operations in World War I.

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[133] Ibid., 40.

[134] Ibid., 88 and 183.

Conclusion

Since the formation of the two countries, Mexico and the United States have shared a complex relationship of varied tension, cooperation, or indifference, depending on the specific location, situation, or time in history. Mexicans and Americans alike have viewed one another with distrust, which is due at least in part to some of the violent aspects of the two countries' shared history. As the government component charged with defending the United States against land-based threats, the United States Army has long been concerned with Mexico. Operations along the Mexican border and in Mexico have affected the Army's development since shortly after the United States became a country, but the Army's operations in Mexico from the end of the American Civil War in 1865 until the beginning of the First World War in 1917 contributed most heavily to the characteristics of the U.S. Army in World War I.

Immediately after the Civil War, the federal government was able to redirect its attention toward its southern neighbor. Napoleon III of France had taken advantage of the diverted attention of the United States government and had taken control of Mexico during the American Civil War, which was in direct violation of U.S. regional interests. Sheridan and 52,000 soldiers immediately posted to the Texas border upon the collapse of the Confederacy, and their security efforts contributed to the fall of the French puppet government. With the demobilization that followed the Civil War, the Army decreased significantly in size and strength. Its primary mission in the Southwest remained unchanged, however, as the developing frontier required security against cross-border raids by Mexican and Indian bandits. The security efforts gave Army leaders experience in asymmetric threats and ambiguous situations, which translate well to every military problem. The Army worked under civilian authorities and alongside civilian law enforcement agencies, which reinforced the American tradition of civilian control of the military.

The most significant effects of the border operations on the World War I Army came about as a result of more conventional operations concerning Mexico. When the Mexican Revolution began intensely in 1910, the Army observed with growing concern the deteriorating

security environment south of the border. In 1911, in response to a raid against Douglas, Arizona, President Taft ordered the Army to mobilize and deploy 20,000 soldiers along the Mexican border in preparation for a possible incursion into Mexico. The incursion never occurred, but the Army learned valuable lessons and was able to implement reforms as a result of the exercises. Some of the reforms were put into practice in 1914, when elements of the Army's 2nd Division occupied Veracruz. The occupation had negligible strategic effects, but the effects on the Army were profound.

The final intervention into Mexico before World War I was the Punitive Expedition in 1916, led by General John J. Pershing. The ad hoc division's mission was to pursue and disband Pancho Villa's bandits after their raid on Columbus, New Mexico, in March of 1916. The expedition was successful in completing its operational task of disbanding Pancho Villa's men, but there were long-term effects on the Army as well. For the first time, the Army used a combined arms team of mechanized forces with all required support elements to operate independently. Infantry, cavalry, artillery, aviation, signal elements, engineers, and a wide variety of combat service support units enabled Pershing's forces to conduct successful long-range independent operations in a hostile environment against an elusive enemy. Pershing took lessons learned in Mexico directly to Europe only months after returning from Mexico, when he eventually took charge of American Expeditionary Forces in Europe.[135]

The doctrine, training, and organization of the Army that entered World War I took form as a result of operations in Mexico and along the Mexican border between 1865 and 1917. During World War I, the Army built on lessons learned in Mexico. The Army's formal doctrine system originated during this time period of this study and reflected the influence of operations in Mexico. The organization of the Army, to include the character of the National Guard and the division structure, also came about as a result of operations in Mexico. The National Guard was

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[135] Millard, "U.S. Army Logistics," 68.

federalized and deployed for the first time to the Mexican border, where it underwent rigorous training that would prepare individuals and units for deployment to Europe shortly after the inaugural deployment to the southwest border. The division structure which originated for operations in Mexico became final during World War I. The divisions were characterized by unprecedented coordination among the combat arms, combat support, and combat service organizations in the infantry division. The complex unit became possible because of advances in technology, weapons, communications, and transportation.[136] Finally, Army training was affected by operations along the border and in Mexico. Unit close-order drill gave way to maneuvers of units as large as divisions after several decades of a lapse in effective training when Army leaders implemented solutions to contingencies in Mexico.[137]

Operations in Mexico have long been a possibility for the United States Army, even into the present. The border continues to be unique in the world. Mexico and the U.S. represent the two most economically diverse geographical neighbors in the world, and issues relating from this disparity turn the borderlands into a heavily trafficked contested area.[138] The nearly 2,000 miles of border are nearly impossible to secure against illegal traffic, and to emplace measures to attempt to stop illegal traffic would have such a deleterious effect on legal traffic as to severely damage the economies of both concerned countries. Economic issues and rampant corruption in Mexican law enforcement makes the drug trade both lucrative and relatively low risk for criminal organizations, except from the threat of other criminal organizations. The border region, especially in the long stretches of uninhabited and inaccessible terrain, is ungoverned territory

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[136] Wilson, *Maneuver and Firepower*, 73.

[137] Burdett, "Mobilizations of 1911 and 1913," 74.

[138] Melissa A. Sturgeon, *A National Strategy to Address U.S./Mexican Border Security Issues* (Carlisle, PA: U.S. Army War College, 2007), 1.

and makes security at America's doorstep a serious challenge.[139] Further compounding the security challenge is the propensity for other-than-Mexican (OTM) persons crossing the border illegally. The number of aliens other than Mexican apprehended while illegally crossing the border into the United States grew from 30,147 in 2003 to 108,025 in 2006, and there is no method to account for those that avoided apprehension.[140] Several thousand of that number are from countries of "special interest" to the United States for their tendency to produce anti-American terrorists.

Because of these issues and a host of others which render the U.S. – Mexican border a complex security problem, the Army will continue to employ troops to secure legal activities and prevent illegal actions by smugglers and OTM infiltrators to the United States. Laws such as *Posse Comitatus* prevent direct law enforcement action by the active military while on U.S. soil, but there are other ways for the military to support border operations. It is not inconceivable that a significant enough threat could originate from Mexico that would cause a radical reinterpretation of the laws restricting military activity against foreign incursions, whether by armed parties or individual infiltration. The issues that caused the Army to focus southward from 1865 to 1917 continue in modern times, and will undoubtedly affect the future Army as much as operations before World War I changed the form and function of the U.S. Army that fought in Europe in 1917.

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[139] Sturgeon, *A National Strategy to Address U.S./Mexican Border Security Issues*, 8.

[140] "A Line in the Sand: Confronting the Threat at the Southwest Border" (House Committee on Homeland Security, Subcommittee on Investigations, October 2006), http://www.house.gov/sites/members/tx10_mccaul/pdf/Investigaions-Border-Report.pdf (accessed January 26, 2011), 27.

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